

Processing CMS Payments

1. Create a new 'Patient Payment' Receipt or use the 'Copay' link on an appointment:
On Receipt, enter amount in the 'Card' field > choose card 'Type' in the dropdown > Save

Add Payment Receipt ?

Payment Information

Post Date	Received Date	Check Date	Reference Batch
10/02/2018	10/02/2018		2834

Patient ID: 20017
 MOUSE, MICKEY WALT MR

Guarantor: - SELECT -

If any part of the Total Amount is a copay then enter that amount into the

Check	Cash	Card	Total
	0.00	0.00	20.00

Type: Discover [DC]
 Last 4: 1111
 Cardholder: MICKEY MOUSE

Additional Info

Reference / Check Number: - SELECT -

1

Save [F2] Cancel

2. Pop-Up CMS processing

Key in the credit card information, or click 'Swipe' to process a card swipe

Click [Pay] and the Credit Card is charged

Receipt Dashboard

Receipt Info Modify

Post Date	Received Date	Type	Last Modified By	ERA	Batch
10/02/2018	10/18/2018	PP			

Patient: MOUSE, MICKEY WALT MR [20017]

Reference/Check

Card	Type	Last 4
20.00	Discover	

Amount	Copay	Escrow
20.00	0.00	20.00

Received From: PC

Actions

Process

Balance: \$20.00

ONE-TIME VAULT PAY PLAN

Cardnumber [Swipe]

MM/YY CVV ZIP

2 Remember card?

PAY

View Payment History

○ If the data is keyed, the user can select "Remember Card" prior to processing, to store the card on file for future use

- The card on file information is stored by CMS, *not* at the practice
- Swiped cards are encrypted, therefore cannot be stored on file

3. Approved > [Print] or Email the receipt

Approved

3098635463
 TID: 3048758
 Authcode: 647414

Receipt

Print or Email Send

3

Print

Canon MG6600 se

Change...

All

e.g. 1-5, 8, 11-13

Portrait

https://plugin.slycepay.com/

Date: 2018-10-18 13:10:08

Card Num : XXXXXXXXXXXXXXX1111
 Card Type : visa
 Type : sale
 Transaction ID : 3048758
 Reference # : 3098635463
 Auth Code : 647414
 Invoice : 1539893407
 Customer ID : 20017
 Name : MICKEY MOUSE
 Description : Onetime Sale
 AMOUNT : \$20.00
 TAX : \$0.00
 TOTAL : \$20.00

I AGREE TO PAY ABOVE TOTAL AMOUNT ACCORDING TO CARD ISSUER AGREEMENT

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Of note: If the Credit Card does not process, and no approval is received, [Process] is still available. You may click it to try again. If the patient decides to pay by another method such as cash, [Delete] this receipt and create a new one.

Actions
 Process
Delete

Confirmation number displays on the Receipt and a Note

Receipt Dashboard

Receipt Info [Modify](#)

Post Date	Received Date	Type	Last Modified By
08/22/2018	09/20/2018	PP	

Patient: MOUSE, MICKEY WALT MR [20017] Balance: -154.00

Reference/Check: [blacked out]

Card	Type	Last 4	Cardholder
20.00	Visa	1111	MICKEY MOUSE

Amount	Copay	Escrow	Processed	Confirmation
20.00	0.00	0.00	20.00	3098232504

Received From: [blacked out] POS Payment Disbursed

Note
Electronic Payment Processed on 09/20/2018 for \$20.00 (3098232504)

How to Void a CMS Credit Card Payment

If a payment is being cancelled the same day it was captured, it is considered a Void. Receipt Dashboard, contains [Void]. If the funds have already settled, the button changes to [Refund].

We require a reason, then click the checkbox confirming that this action cannot be undone > Click Submit. Receipt is deleted. The user is taken to Receipt History where the transaction can be viewed.

Receipt Dashboard Receipt: 110702 Type: PP

Receipt Info [Modify](#)

Post Date	Received Date	Type	Last Modified By
10/02/2018	10/02/2018	PP	

Reference/Check: [blacked out]

Card	Type	Last 4	Cardholder
20.00	Discover	[blacked out]	[blacked out]

Amount	Copay	Escrow	Processed	Confirmation
20.00	0.00	0.00	20.00	[blacked out]

Received From: [blacked out]

Note
Electronic Payment Processed on 10/02/2018 for \$20.00 (3098232504)

Buttons: [Void] [Refund]

Receipt Dashboard Receipt: 109282

Receipt Info [Modify](#)

Post Date	Received Date	Type	Last Modified By	ERA	Batch	Reversed R	Post
08/09/2018	08/09/2018	PP	SUPPORT2682		2747		

Patient: DYLAN, ROBERT [3856] Balance: 00

Card: 40.00 MasterCard Last 4: [blacked out]

Amount: 40.00 Copay: 40.00 Escrow: 40.00

Received From: [blacked out] POS

Reason for Deleting
patient decided the wait was too long - voided in CMS

I understand that this action cannot be undone

To view, Include 'Deleted'

Receipt History

Filter Criteria [Clear](#)

Receipt: [blacked out] Received From: [blacked out] Received To: [blacked out] Posted From: [blacked out]

From/To: [blacked out] Reference: [blacked out] Method: All Amount: [blacked out]

Receipt	Received	Posted	Type	Reference	Method	Amount
109282	08/09/2018	08/09/2018	PP	DYLAN, ROBERT [3856]	Card	40.00
8850				Deleted Receipt		00
8850				User: SUPPORT2682		01
8850				Date/Time: 08/09/2018 - 08:31 AM		02
8850				Reason: patient decided the wait was too long - voided in CMS		07

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How to Refund a CMS Credit Card Payment

If a payment is cancelled *after* the day it was captured, it is considered a Refund.

1. On the Receipt Dashboard > Click [Refund]

Receipt Dashboard Receipt: 110539 Type: PP

Receipt Info [Modify](#)

Post Date	Received Date	Type	Last	Batch	Reversed Receipt
08/22/2018	09/20/2018	PP	SUP	3	

Patient: MOUSE, MICKEY WALT MR [20017]

Reference/Check

Actions: Post, (Mode), **1 Refund**

2. You are taken to the 'Create Refund Receipt > Save
If this is a partial refund you may edit the amount
3. In the pop-up > Click [Refund]

Create Refund Receipt ?

Refund Type: Patient Refund

Refund Information

Post Date	Mailed Date	Check Date
10/18/2018	10/18/2018	

Patient ID: 20017 MOUSE, MICKEY WALT MR **2**

Refund Amount: 20.00 (Max: \$20.00)

Additional Info

Save [F2] Cancel

Refunds

Recent: 2018-10-18 (\$20.00) refund **3**

Print or Email Send

Refunds: \$ 20 Refund **2**

Print or Email Send

4. [Print] or Send Email
5. Click to [Post] to post the refund as usual
 - o 'PR' is the Receipt type {Patient Refund}
 - o Link to original receipt, under 'Reversed Receipt'
 - o Confirmation number

Receipt Dashboard Receipt: 110697

Receipt Info [Modify](#)

Post Date	Received Date	Type	Batch	Reversed Receipt
10/18/2018	10/18/2018	PR	2837	110539 5

Patient: MOUSE, MICKEY WALT MR [20017]

Reference/Check: 0.00 Processed: 20.00 Confirmation: 3098635025

Received From: POS Payment Disb

Note: Electronic Refund Processed on 10/18/2018

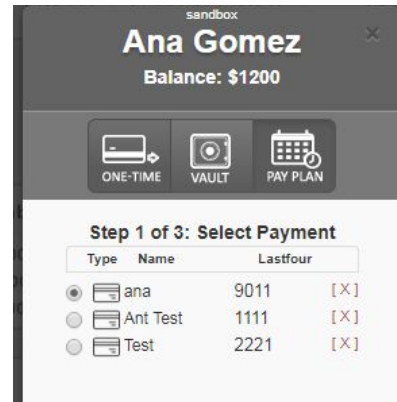
Lockbox payment

Actions: Post, Post (Expert Mode)

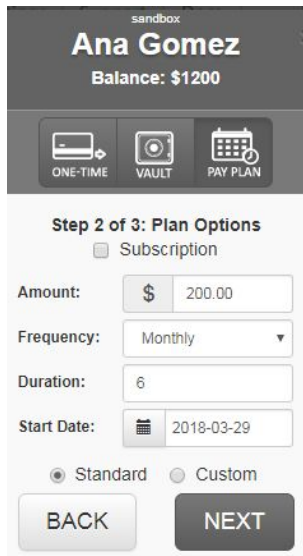
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Payment Plans (Recurring Payments):

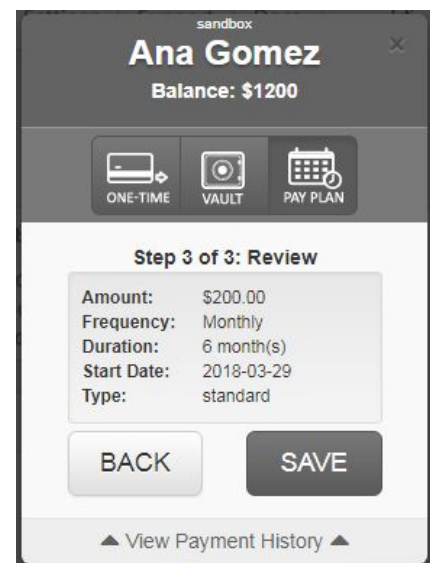
Step 1. Choose [Pay Plan]



Step 2: Select a card-on-file, or Add Card > click 'Next'

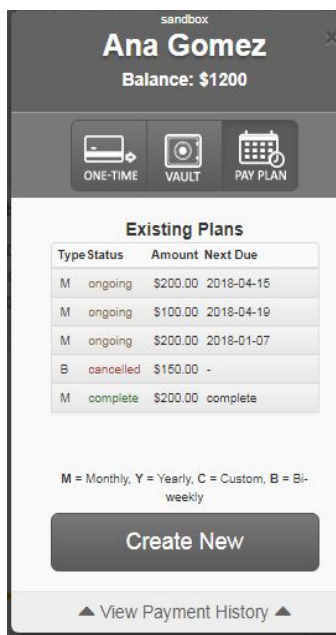


Step 3: Enter Amount, Frequency, Duration and Start Date.



Step 4: Review the payment plan > Save

Choose 'View Payment History' to see all payments made



*Note that Payment Plan Payments do not post automatically, they need to be retrieved from the Slye Gateway and posted.